NC SNAP

North Carolina

Support Needs Assessment Profile

Software User's Guide

Version 2.1

Preface

This *NC-SNAP* Software User's Guide was written to support the area program/LME data managers assigned to maintain the local *NC-SNAP* data files. The functionality of the *NC-SNAP* software, including a definition of all data fields and all report options is provided. For convenience, changes to the software reflected in the latest upgraded are summarized below.

February 2005 Upgrade
(Version 2.1 and Version 1.2.3a)

The *NC-SNAP* software version 2.1 upgrade was initiated to improve the software's compatibility with newer versions of Microsoft Windows® and Microsoft Access® applications. The *NC-SNAP* software version 2.1 is compatible with Access 2000® and later (e.g., Access 2000, 2003 and Access XP). Version 2.1 will not operate with Access 97; however, an interim version of the *NC-SNAP* software (Version 1.2.3a) that functions with Access 97 was created for sites that could not upgrade Access applications at this time. It contains all the features added to the version 2.1 software. **All sites should verify that their *NC-SNAP* main menu displays version 2.1 or version 1.2.3a.**

Additionally, several features were added to the software in an effort to enhance functionality and improve the integrity of the *NC-SNAP* profile data collected. The upgrade was a collaborative effort and special thanks goes out to all of those individuals who provided suggestions for improving the *NC-SNAP* software. This guide has been updated throughout to reflect the version 2.1 software changes. For convenience, the features added to the *NC-SNAP* software are summarized below.

1. Two new out-of-service codes were added to the software, including *Refused Services* and *Unable to Locate,*

2. The definitions of some of the **DD Support** codes shown in the software's DD Support code pull down menu were changed to more accurately define their appropriate use. Consequently, some of the definitions do not currently match those listed on the *NC-SNAP* form. The codes listed on the *NC-SNAP* form and how they correspond to the new DD Support codes listed in the database are shown below.

- **First Contact** = Service Determination Pending,
- **Waiting List (no services)** = Needed Services Not Available,
- **Waiting List (insufficient services)** = In Service-More Services Requested (i.e., waiting for additional services),

3. A feature was added to the program to ensure that changes to the DD Support code would transmit to the state with a regular send (i.e., a "send all" records should no longer be required to ensure that edits to the DD Support code are transmitted to the state database).

4. Several new reports were added to the reports section of the software program. A definition of the six new reports are listed below. The DD Support codes included in a particular report are shown in parenthesis.

- **Receiving Services**: lists all active clients (INS and SWL),
- **Inactive Clients**: lists all clients who are not receiving services (MAP, MOS, NRC, DEC, UTL, RFS),
- **Past Due Assessments**: lists all clients who are overdue for their annual snap assessment (i.e., more than twelve months since last snap (INS, SWL, FCN)). This report was added to allow the LME to actively monitor for overdue *NC-SNAP* assessments and take corrective action to remain in compliance with the state's requirement to submit annual *NC-SNAP* assessments on

all persons receiving DD services. It is highly recommended that area programs/LMEs run this report monthly, and follow-up with case managers and provider agencies who are out of compliance.

- **Assessments Pending**: lists all clients who are due for their annual snap assessment in the next 30 days (INS, SWL, FCN),
- **Needed Services Not Available**: lists all clients who are waiting for services (WLN), and
- **Service Determination Pending**: lists all clients who have had contact with the LME, but services have not yet been determined (FCN).

Custom reports by DDSupport code can also be created by selecting the desired code(s) from the pull down menu under **DD Support** in the custom report section. Multiple codes can be selected. To clear the DD Support Criteria, hit **Clear DD**.

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Overview

The *NC-SNAP* is an assessment tool that, when administered properly, measures an individual's need for developmental disabilities (DD) supports and services. *NC-SNAP* profile information is collected for persons with developmental disabilities at all of the state's local Area Mental Health, DD & Substance Abuse programs and all four Developmental Centers in North Carolina. *NC-SNAP* profile information is collected and transmitted to a statewide database to facilitate state-level planning of the DD service delivery system.

1.0   Introduction

To maintain the integrity of the *NC-SNAP* profile information collected in the statewide database, it is important that all individuals assigned to enter *NC-SNAP* data follow the guidelines set out in this guide. This guide describes how to use the *NC-SNAP* software and provides helpful advice for maintaining the area program/LMEs' *NC-SNAP* databases. This guide was written as a reference guide for those individuals assigned to maintain the *NC-SNAP* database in their respective area programs/LMEs.

This guide provides instructions on a) entering new consumer information and SNAP profiles, b) adding additional *NC-SNAP* profiles on consumers already in the database c) viewing and editing information in the *NC-SNAP* database, d) generating reports, e) how to send data to the statewide database, f) how to complete the initial software utilities setup, and g) how to enter certified examiners. The actual *NC-SNAP* software menus are used throughout this guide for easy recognition. This document uses several style conventions for clarity:

- Buttons and keys are shown in bold.
- Field names and menu options are written as they appear on the screen and are shown in bold.

- **Notes** provide additional information about important points.

**Reminder** Reminders are used to emphasize important points that can cause problems later on.

2.0 Getting Started

The *NC-SNAP* software, *NC-SNAP* database, and *NC-SNAP* shortcut must be installed on your computer for the program to operate. For information regarding *NC-SNAP* software installation requirements refer to the state's software distribution site at: www.ncdmh.softwaredistribution.net

The *NC-SNAP* software screens should be completed using the *NC-SNAP* Supplemental Information Sheet and the first page of the *NC-SNAP* profile. Both of these data sources should be supplied to the data manager before attempting to enter *NC-SNAP* profile information. Any missing or questionable information should be requested from the examiner and noted on the data sheet. It is also highly recommended that the data manager keep the original, or a copy of, the Supplemental Information Sheet and the *NC-SNAP* assessment profile for future reference and possible data conflict resolution.

> **Note**: *NC-SNAP* profiles for consumers living at one of the state Developmental Centers do not have to be entered into the area program/LME's's *NC-SNAP* databases. Developmental Centers are responsible for completing and entering *NC-SNAP* profiles on all their residents.

To initiate the *NC-SNAP* software program, click on the *NC-SNAP* shortcut icon located on the desktop of the computer where the *NC-SNAP* software is installed. The *NC-SNAP* Main Data Menu shown in Figure 1 will appear on the screen.
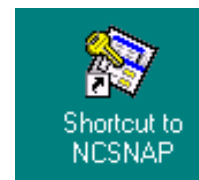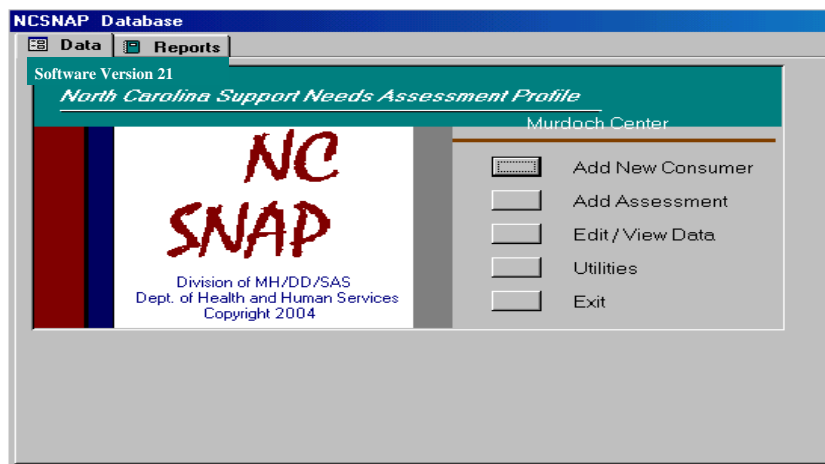
Figure 1 *NC-SNAP* **Main Data Menu**

The main menu has two folder tabs at the top, **Data** and **Reports.** The Main Data Menu shown in Figure 1 is the menu that appears when the **Data** tab is selected, which is also the menu that is displayed when the program is initialized from the *NC-SNAP* shortcut icon. The Main Data Menu is where additional menus can be found that allow the data manager to: a) Add New Consumers, b) Add Assessments, c) Edit/View Data, and d) set Utilities. Each of these functions will be explained in detail in the following sections.

3.0 Utilities

NC-SNAP utility functions include setting the **Agency Name** and **Service Provider** status, setting the **Data File Path** and **DD Report Path**, and entering newly certified *NC-SNAP* **Examiners**. To access the Utilities Menu click **Utilities** on the Main Data Menu. The Utilities Menu shown in Figure 2 will appear.
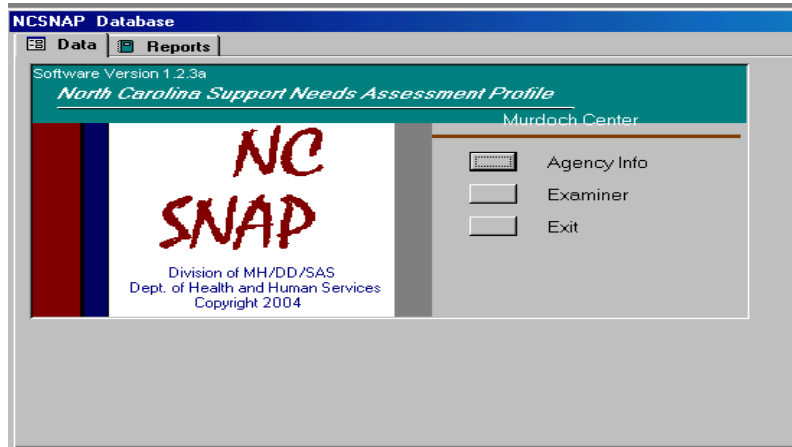
Figure 2 Utilities Menu

3.1   Area Program/Agency Information

Before consumer data can be entered into the *NC-SNAP* software databases, the software program must be configured with specific area program/LME and file path information. Agency information is set when the *NC-SNAP* software is installed and anytime a reinstall of the software is required. To do the initial set-up, click **Agency Info** on the Utilities Menu; the Area Program/Agency Information Screen shown in Figure 3 will appear.
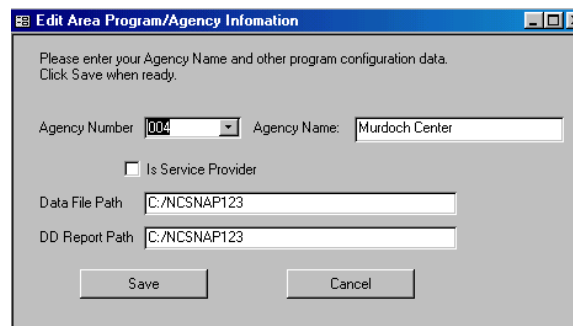

Figure 3 Area Program/Agency Information Screen

The fields identified below must be entered on the Area Program/Agency Screen before *NC-SNAP* profile data can be entered into the program database. Once the information indicated below has been entered, click the **Save** button.

1. **Agency Number**: select your agency's name from the list of area Programs/LMEs listed by using the down-arrow at the end of the **Agency Number** field.

2. **Is Service Provider**: indicate whether your agency is a service provider (provides direct services in addition to case management (e.g., does the area program/LME operate a group home)). To indicate "Yes," click on the blank square next to the **Is Service Provider** field. If the area program/LME only contracts with private providers, this block should be left blank.

3. **Data File Path**: enter the file path where the *NC-SNAP* database is located. The *NC-SNAP* database is where consumer *NC-SNAP* assessment information is stored. The default **Data File Path** is **C:\ncsnap**.

4. **DD Report Path**: enter the file path where the software program will store reports that are transmitted to the statewide database. The default **DD Report Path** is **C:\ncsnap**.
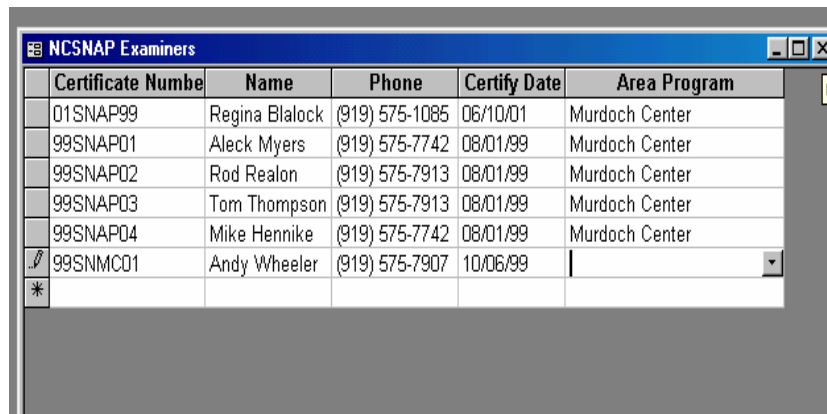
   Note: Typically, the **Data File Path** and the **DD Report Path** will be the same. The default paths should only be changed if the data files are loaded on a network. In such cases, the Network Administrator should provide the data paths.

3.2   Examiner Information

Examiner information must be entered into the Examiner Information Table before *NC-SNAP* profiles conducted by that examiner can be entered. If the error message "You Entered an Invalid Examiner Code" appears when trying to enter an NC-SNAP profile, the examiner must be added to your local Examiner Table before the profile can be entered.

To open the Examiner Table, click the **Examiner** button on the Utilities Menu; the Examiner Information Table shown in Figure 4 will appear. To save examiner information and return to the Utilities Menu, click the **X** (close screen button) on the upper right hand corner of the screen.

	Certificate Number	Name	Phone	Certify Date	Area Program	
	01SNAP99	Regina Blalock	(919) 575-1085	06/10/01	Murdoch Center	
	99SNAP01	Aleck Myers	(919) 575-7742	08/01/99	Murdoch Center	
	99SNAP02	Rod Realon	(919) 575-7913	08/01/99	Murdoch Center	
	99SNAP03	Tom Thompson	(919) 575-7913	08/01/99	Murdoch Center	
	99SNAP04	Mike Hennike	(919) 575-7742	08/01/99	Murdoch Center	
	99SNMC01	Andy Wheeler	(919) 575-7907	10/06/99		

Figure 4 Examiner Information Table

The **Name**, **Certificate Number**, **Phone** number, and certification date (**Certify Date**) of each examiner conducting *NC-SNAP* profiles for an area program/LME must be entered in the Examiner Table. **Area program** is an optional field that may be utilized by *NC-SNAP* training personnel or area program/ LME data mangers if desired.

To help maintain the area programs/LMEs' Examiner Tables, a list of recently certified examiners is forwarded to the appropriate area programs/LMEs after all examiner training sessions. Upon receipt, all new examiners listed under an area program/LME should be entered into the Examiner Table. Examiner training reports are formatted so that they can be copied and pasted directly into the area programs/LMEs' Examiner Tables without having to key each entry.

4.0   Adding a New Consumer

The Add New Consumer Screen is for entering consumers who have never had an *NC-SNAP* profile entered before. The Add New Consumer Screen should never be used until it has been verified that the consumer has not been previously entered into the *NC-SNAP* database. To check if a consumer is already entered, click the **Edit/View Data** option or the **Add Assessment Profiles** option on the Main Data Menu and search the Consumer List. The **Add Assessment** option is discussed in section 5.0. The **Edit/View Data** option is discussed in section 6.0. To open the Add New Consumer Screen, click **Add New Consumer** on the Main Data Menu; the screen shown in Figure 5 will appear.

Figure 5 Add New Consumer Screen

Note: If the Add New Consumer screen does not appear completely, click on the maximize button **[]** (the center square) on the top right hand corner of the screen.

The Add New Consumer Screen should be completed using

the *NC-SNAP* Supplemental Information Sheet and the *NC-SNAP* profile. All fields on the Add New Consumer Screen, except for case number (**Case No**.), middle initial (**M.I**.), and phone number (**Phone**) are required. The software program will not allow the consumer profile data to be saved without information in all of the required fields. The consumer's name and address are not transmitted to the statewide database; however, both of these fields are required for use by the area program/LME. The information required for each field on the Add New Consumer Screen is described below:

a) **Unique ID** is constructed using the first three letters of the consumer's last name + the first letter of the consumer's first name + the consumer's date of birth (using six digits) written day/month/year for a total of ten characters (e.g., SMIJ052559). If two consumers have identical **UniqueID** numbers, a letter (i.e., A, B, C) can be added to the end of one of the **UniqueIDs** to create a unique number.

   Note: The consumer's uniqueID number should match the name and date of birth on his or her Medicaid card.

b **Case No.**: enter the consumer's case number assigned by the area program/LME. **Case No.** is an optional field that can be left blank or defined by the area program/LME.

c) **SSN**: enter the consumer's social security number. If the **SSN** being entered is already assigned to a consumer in the database, the Duplicate SSN screen shown below prompts the operator to correct the entry.
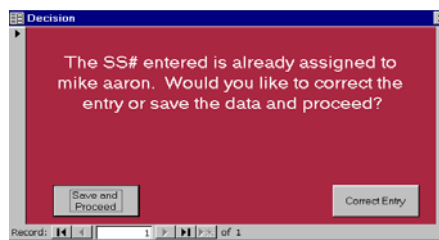
d) **Area Program**: this is a fixed field that is set on the Area Program/Agency Information Menu. **Area Program** cannot be changed on the Add New Consumer Screen.

e) **Significant Natural Supports In Place**: this is a yes/no field used to indicate if the individual has a significant amount of his or her supports provided by unpaid persons.

f) **Last Name**: enter the consumer's last name.

g) **F. Name**: enter the consumer's first name.

h) **M. I.**: enter the consumer's middle initial (optional entry).

i) **DOB**: enter the consumer's date of birth entered as month/day/year. The year must include four characters (e.g., 01/25/1955). If the name and date of birth do not match the uniqueID entered, the Discrepant Data screen shown below appears. This screen gives the user the option to correct the discrepancy or to save the data and proceed.
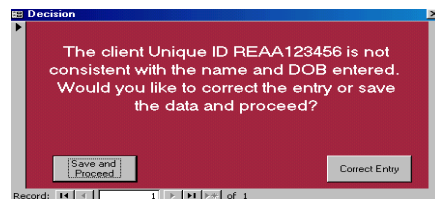
j) **Age**: this is a fixed field computed by the *NC-SNAP* software based on the consumer's date of birth.

k) **County**: enter the county having legal or fiscal responsibility for the consumer (i.e., the County that the person's Medicaid comes through). This field may or may not correspond with the county of residence.

l) **Address**: enter the consumer's address of residence.

m) **City**: enter the consumer's city of residence.

> **Reminder**   The Add New Consumer Screen should never be used before verifying that the consumer is not already entered into the *NC-SNAP* database.

n) **State**: enter the consumer's state of residence.

o) **Zip**: enter the consumer's zip code.

p) **Phone**: enter the consumer's home phone number (optional entry).

q) **Last Assessment Date**: this field indicates the date the last *NC-SNAP* profile was conducted. The *NC-SNAP* software automatically assigns this value when an *NC-SNAP* profile is entered. For new consumers, this field will be blank.

r) **Res. Placem't**: enter the type of residence where the consumer lives. This field consists of twenty-seven predefined codes that are stored in a lookup table. To open the table, click the down arrow at the end of the **Res. Placem't** field. The predefined residential codes listed in the lookup table are shown in Figure 6. **Local Provider** indicates that the area program/LME or county operates the facility.

s) **DD Support**: this field consists of eight predefined codes stored in a lookup table that should reflect the consumer's current support status. The area program/LME should have procedures in place to ensure that the current support status of all consumers is kept up-to-date (to avoid excessive overdue NC-SNAP assessments, it is particularly important to update the DDSupport code when a consumer goes out of service). To open the table, click the down arrow next to the field. The predefined support codes listed in the lookup table are identified in Figure 7.

After all consumer information is completed, the consumer's *NC-SNAP* assessment profile must be entered. Consumer information cannot be entered and stored by the *NC-SNAP* software without entering an *NC-SNAP* assessment profile for that consumer. To open the Assessment Menu after adding a new consumer, click the **Enter Assessment** button on the bottom left side of the Add Consumer Screen; follow the instructions given in section 5.0, Add Assessment Profiles.

Res. Placem't Code	Res. Placem't Type
AFL	Alternative Family Living - Local Provider
AFP	Alternative Family Living - Private Provider
CHA	Congregate - Holy Angels
CHC	Congregate - Howell's Center
COO	Congregate - Other (Specify)
CPH	Congregate - Psychiatric Hospital
CTL	Congregate - Tammy Lynn Center
FAH	Family Home
FCH	Family Care Home
FOH	Foster Home
GLD	Group Home - Local Provider - DDA
GLI	Group Home - Local Provider - ICF
GLO	Group Home - Local Provider - Other
GPD	Group Home - Private Provider - DDA
GPI	Group Home - Private Provider - ICF
GPO	Group Home - Private Provider - Other
IND	Independent Living
MRB	MR Center - Black Mountain
MRC	MR Center - Caswell
MRE	MR Center - O'Berry
MRM	MR Center - Murdoch
MRW	MR Center - Western Carolina
NRH	Nursing/Rest Home
ORO	Other Not Listed (Specify)
SLL	Supervised/Assisted Living - Local Provider
SLP	Supervised/Assisted Living- Private Provider
SNH	Skilled Nursing Home

Figure 6 Residential Code Table

DDSupport-Code	DDSupportDesc
INS	In Service
SWL	In Service - More Services Requested (i.e., waiting for additional services)
FCN	None - Service Determination Pending (same as First Contact)
WLN	None - Needed Services Not Available (was Waiting list (No Services))
DEC	None - Deceased
MOS	None - Moved Out of State
MAP	None - Moved to Another Area Program/LME
NRC	None - No Longer Receiving Services
RFS	None - Refused Services
UTL	None - Unable to Locate

Figure 7 DD Support Codes

5.0   Add Assessment Profiles

The Assessment Profile Menu is used to enter *NC-SNAP* assessment profiles for new and existing consumers. To open this menu from the Add Consumer Screen, click the **Enter Assessment** button. To open the *NC-SNAP* Assessment Screen from the Main Menu, click **Add Assessment**. Select the consumer by perusing the consumer list or using the search function described in section 6.0. (an arrow on the left side of the screen will be pointing at the consumer's name), then click the **New Assessment** button; the Add Assessment Menu shown in Figure 8 will appear.

Figure 8 *NC-SNAP* **Assessment Profile Screen**

To enter a consumer's assessment profile, click the cursor on the button that corresponds with the score marked on sheet one of the *NC-SNAP* profile. Complete all eleven scores. The **Daily Living Score**, **Health Care Score**, **Behavioral Score**, **Overall Level of Support**, **Cumulative Score**, and **Raw Score** fields are computed by the *NC-SNAP* software based on the *NC-SNAP* profile information entered. The **Examiner Code**, **Relationship**, and **Assessment Date** must be entered according to the following guidelines:

a) **Examiner Code**: enter the examiner's code found on page one of the *NC-SNAP* profile sheet under *NC-SNAP* **Certification No**. The name of the examiner will automatically appear on the screen when a valid **Examiner Code** is entered. Operators should verify that this name corresponds with the name provided on the NC-SNAP form. If this is not the case, you are asked to contact SNAP Central immediately.

Please note that the **Examiner Code** is a previously defined field that is entered using the Examiner Table (refer to Figure 4). If an examiner's code is entered on the Assessment Menu that has not been previously entered in the Examiner Table, the *NC-SNAP* software won't allow the examiner's code to be entered; the message "You have entered an invalid examiner code…" will appear on the screen. If this message appears, the operator can reduce the Assessment Menu by clicking on the reduce screen button (the far left button in the right hand corner of the screen); open the Examiner Table; enter the examiner's name, certification number, phone number, and certification date; close the Examiner Table, then maximize the Assessment Menu screen. The consumer and assessment information entered will not be lost if the minimize screen function is used.

> **Note:** Only certified examiners can administer the *NC-SNAP* assessment tool.

b) **Relationship**: enter the relationship of the examiner to the consumer. This information is found on sheet one of the *NC-SNAP* profile sheet. The relationship will generally be a working title such as case manager, support broker, team leader, QMRP, QDDP, ADVP coordinator, unit manager, program coordinator, etc.

c) **Assessment Date**: enter the date the *NC-SNAP* assessment was completed shown on the bottom of the *NC-SNAP* profile sheet. This date should always reflect the date the NC-SNAP assessment was completed. Duplicate assessment dates for the same consumer cannot be entered. If an assessment has previously been entered using the same assessment date, the following message will appear.
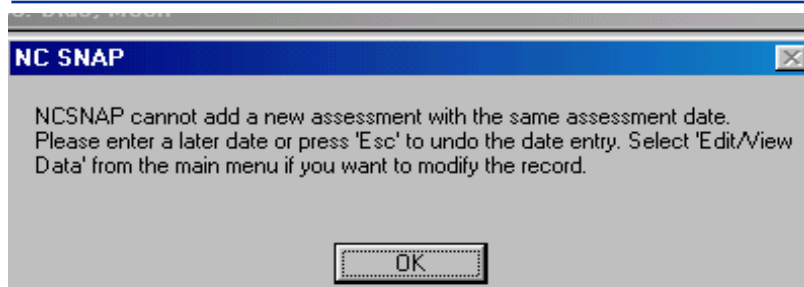
After all fields on the Assessment Profile Menu have been entered, click **Save Entry**. To exit the program at any time without saving the assessment profile information, click **Cancel**. The Assessment Profile Screen always returns to the Consumer List. To exit the program from the Consumer List, click the **Return to Main Menu** button and then click **Exit**.

6.0 Edit/View Data

The Edit/View Data Screen is used to view existing consumer information and *NC-SNAP* assessment profiles or to **make a correction** to previously entered information. To open the Edit/View Data Screen, click on the **Edit/View Data** button on the Main Data Menu; the Consumer List shown in Figure 9 will appear on the screen.
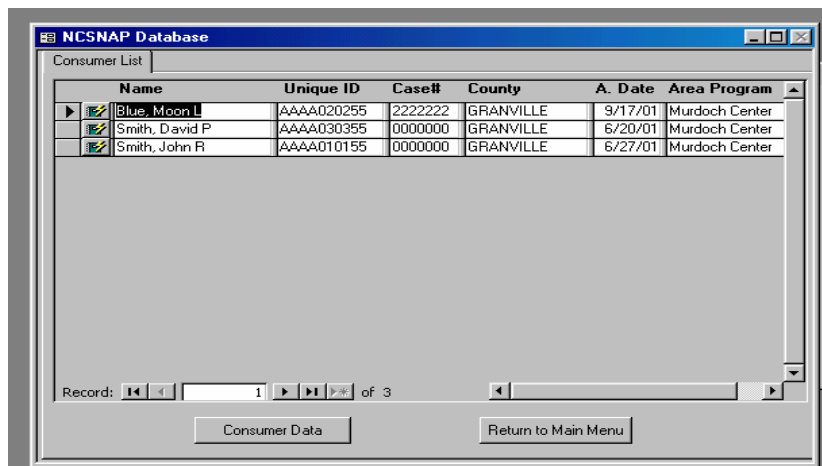

Figure 9 Consumer List

To view or edit consumer information, select the desired consumer by clicking next to the appropriate name (an arrow will be pointing to this consumer). To search the data file for a specific name, use the Microsoft Access® search function by clicking on the binocular icon (shown to the right) on the Microsoft Access® toolbar. The Search Criteria Screen shown in Figure 10 will appear.
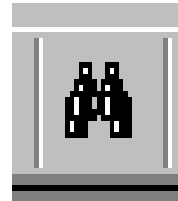
Search Icon

Note: The search feature only works if Microsoft Access is installed on your computer.
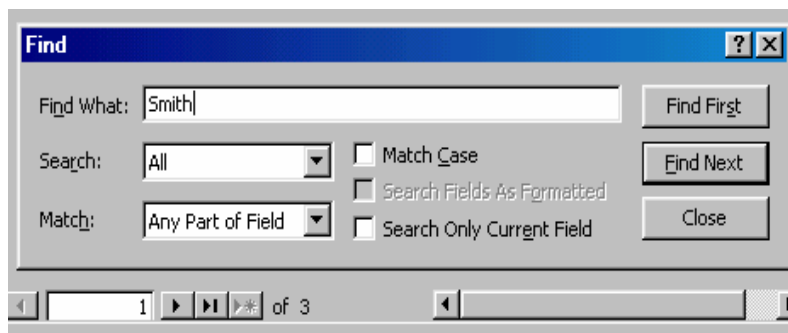

Figure 10 Search Criteria Screen

On the Search Criteria Screen, set the **Match** field to **Any Part of Field** and uncheck the **Search Only Current** field. Enter a name in the **Find What** field. To search only a specific field in the Consumer Table, place the cursor in the column you want to search and select **Search Only Current Field**.

To view historical assessment profiles on any consumer, click the small lightning bolt next to the consumer's name on the Consumer List (see Figure 9). To view the consumer's complete information page, click **Consumer Data** and the Edit Consumer Screen shown in Figure 11 will appear.

Figure 11 Edit Consumer Screen

To edit information on the Edit Consumer Screen, click on the square next to **make a correction**. A prompt to enter your initials will appear. The input mask on this field requires three characters; enter your first, middle, and last initial. Any field on the Edit Consumer Screen can be edited; however, be extremely careful not to leave any fields blank (the only fields not required to have data are case number, middle initial and phone number). Blank fields may prevent the transfer of data to the statewide database.

To view, edit, or delete an assessment profile from the Edit Consumer Screen, click on the **Assessments** button on the bottom of the screen. A list of all SNAP assessment profiles for that consumer will appear.

> **Reminder** Do not leave any fields on the Consumer Information Screen blank.

Figure 12 SNAP Profiles Screen

Click next to the assessment that you would like to view or edit and then click **Assessment Profile**; the Assessment Profile Screen discussed in section 5.0 will appear (refer to Figure 8). If you are editing an assessment profile due to a error, the **make a correction** block must be checked on the Edit Consumer Screen before opening the assessment profile. To delete an assessment that was inadvertently entered under the wrong consumer, place the cursor next to the assessment and hit **Delete Assessment**.

Note: Do not use the **make a correction** function to make changes to an existing assessment instead of adding an assessment profile. The *NC-SNAP* software is designed to keep historical records of all assessment profiles completed on a consumer. Using the **make a correction** feature to add a new assessment will overwrite the current profile and the consumer's assessment history will be lost.

7.0 Generating Reports

The Reports Menu provides a wide array of options for generating formatted *NC-SNAP* data reports. Selecting the **Reports** tab on the Main Menu will display the Reports Menu shown in Figure 13. The Reports Menu consists of the **Select a Report**

section, which lists numerous standard reports, and the **Define Data Range** section, which facilitates customized reports by allowing the user to specify search criteria for any standard report. The options and reports available through the **Standard Reports** section and the **Define Data Range** section of the Reports Menu are defined in the next two sections.

The Reports Menu is also used to send data to the statewide database using the **Report to DD** report option. Transmitting data to the statewide database is discussed in section 8.0.

Figure 13 *NC-SNAP* **Reports Menu**

7.1   Standard Reports Section

To select a report on the **Standard Report** section, use the down arrow to search for the desired report and then click **Preview**. Reports can be grouped by Area program/LME (**AP**), **Region**, or **No break**. To erase previously selected report criteria used in the **Define Data Range** section, click **Refresh**. The reports listed below are available under **Standard Reports**:

a) **Consumer List**: a listing of all consumers entered in the *NC-SNAP* database, including their Unique ID, Name, SSN, Age, Last Assessment Date, DDSupport Code, and current assessment profile.

b) **Age Group**: a count of all consumers grouped by age (0 - 1, 2 – 6, 7 – 15, 16 +) and *NC-SNAP* profile level.

c) **County**: a count of consumers grouped by overall assessment profile scores and county.

d) **Overall Levels**: a count of consumers grouped by overall assessment profile scores.

e) **Domain Levels**: a count of consumers grouped by domain level.

f) **DD Supports**: a tally of how many consumers are in service or waiting for services displayed by overall assessment profile level.

g) **Residential Type**: a count of consumers grouped by residential type and overall assessment scores.

h) **Receiving Services**: Lists all active clients who are receiving services.

i) **Inactive Clients**: lists all clients who are no longer receiving services.

j) **Past Due Assessments**: lists all consumers who are overdue for their annual NC-SNAP assessment (assessment has not been completed within twelve months).

k) **Assessments Pending**: lists all consumers who are due for their annual *NC-SNAP* assessment in the next thirty days (coming due).

l) **Needed Services Not Available**: lists all consumers who are waiting to receive services (DD Support Code WLN).

m) **Service Determination Pending**: lists all consumers being screened, but not yet in service (DD Support Code FCN).

h) **Other Residential**: a listing of just those consumers assigned to the "other" residential placement category.

i) **Examiner List**: lists all examiners entered into the local examiner table.

j) **Class Sheet**: a pre-class list that can be printed by those individuals conducting examiner certification classes to facilitate the assignment of certification numbers.

k) **Report to DD**: this report option is used to transmit data entered at the area program/LME to the DD Section (statewide database). Refer to section 8.0 for more information regarding sending data to the statewide database.

7.2 Define Data Range Reports Section

The **Define Data Range** reports section can be used to specify search criteria prior to generating any of the standard reports. Any combination of search criteria can be used to limit a report. To clear previously defined search criteria from the screen click **Refresh**. A description of each search criteria is given below:

Note: Several report options are for state-wide monitoring and may not be applicable at the area program/LME level (e.g., Region, Area program, etc.).

a) **Region**: limits a report to one region.

b) **Area Prog**: limits a report to a specific area program/LME or Developmental Center.

c) **Assess. Date**: limits the number of records to a specific date range. (By leaving the beginning date blank and entering the current date minus one year in the ending date, you will get a report of all consumers with SNAP profiles that are over a year old.)

d) **Age**: limits a report to a specified age range (0-1, 2-6, 7-15, 16+).

e) **County**: limits a report to a selected responsible county.

f) **Examiner**: limits a report to a specific examiner.

g) **DD Support**: limits a report to specified DD Support Codes.

h) **DD Support Criteria**: lists the DD Support Codes included in the report.

i) **Clear DD**: Clears the DD Support criteria.

j) **Overall Levels**: limits a report to specific profile level(s).

8.0   Transmitting *NC-SNAP* Data to the Statewide Database

To transmit *NC-SNAP* data to the statewide database from the Reports Menu, select the **Report to DD** report option. The Report to DD Menu shown in Figure 14 will appear.
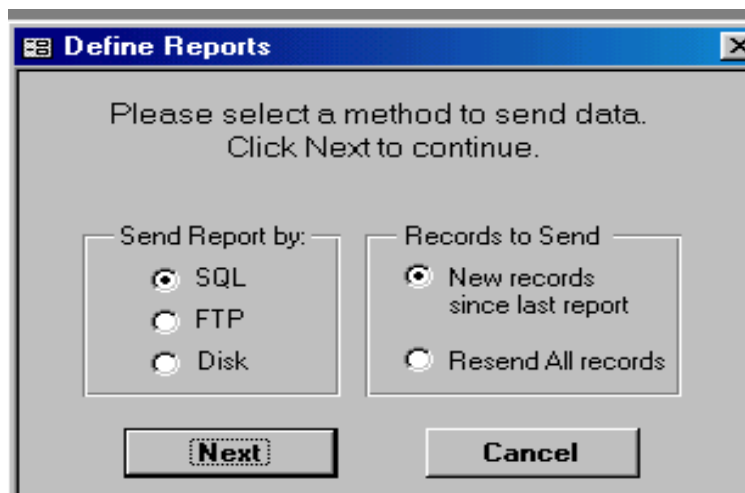

Figure 14 Report to DD Menu

> *NC-SNAP* data should always be transmitted to the statewide server using **SQL** if possible.
>
> **Reminder**

8.1   Transmit Options

NC-SNAP data reporting options listed include **SQL**, **FTP**, and **Disk**. Additionally, records can be transmitted using the **New records since last report** option or the **Resend All records** option. All reporting options are explained in the following sections.

8.1.1 SQL

NC-SNAP data should always be transmitted to the statewide server using **SQL** if possible. **SQL** allows data to be transmitted directly to the statewide server. The status of **SQL** data transmissions is always reported to the operator, which allows the operator to know immediately if the transmission was successful. A report listing the records accepted by the statewide server is also available when sending data **SQL**. It is recommended that area programs/LMEss using **SQL** transmit data every time a batch of *NC-SNAP* profiles are entered. At a minimum, **SQL** transmissions should be done monthly; however, weekly transmissions are preferred.

8.1.2 FTP

If **SQL** is not operational, *NC-SNAP* data should be transmitted to the statewide database by selecting **FTP**. **FTP** transmits a data file to the Raleigh server where it is stored until a staff member downloads it into the statewide database. The status of **FTP** data transmissions is always reported to the operator; however, when using the **Resend all Records** function, the report will include all records in the area program's/LME's's *NC-SNAP* database. The statewide database software determines which records to add or update in the statewide database when the file is downloaded.

> **Note:** **SQL** and **FTP** data transmission options both specify a URL address. Do not change the URL address unless notified by the central office in Raleigh.

8.1.3   Disk

Using Disks to transmit data to Raleigh has proven to be problematic and is no longer considered a transmit option. The coordinators of the *NC-SNAP* project are committed to the electronic transmission of all *NC-SNAP* data. If **SQL** or **FTP** is not operational, data managers should work closely with their computer support department to get one of these data transmission options functional. Technical support is available to local IT or MIS departments through the state technical support department by contacting Bill Satterfield at (919) 733-7260 or Bill.Satterfield@ncmail.net.

8.1.4   New records since last report

Records should typically be sent by selecting the **New records since last report** option. The **New records…** reporting option sends all new consumer and assessment records that have been entered since the last data transmission. Edits to the uniqueID and the DD Support code are also transmitted with a regular send. Some changes made to consumer information (i.e., residential placement, DD supports, etc.); however, may not be transmitted to the statewide server until a new *NC-SNAP* profile is completed. The statewide database saves consumer information and *NC-SNAP* profiles as a single record for a historical account of when, where, and by whom the *NC-SNAP* profile was completed.

8.1.5   Resend all Records

The **Resend all Records** option should be used any time there is doubt that information was transmitted successfully. It is also recommended that the **Resend all Records** option be selected once every four to six months just in case transmissions did not make it into the statewide database. The **Resend all**

> **Reminder**   At a minimum, *NC-SNAP* data should be transmitted to the statewide server monthly; however, weekly transmissions are preferred.

Records option was added as a safeguard against missing data due to failed transmissions. The **Resend all Records** option sends all the records in the area program's/LME's's data files to the state database and the server software determines which records to append. When **Resend all Records** is selected, a prompt asking "Are you sure you want to SEND all records?" will appear; click **Yes**.

8.2 Sending Data

To send data, click next to **SQL** or **FTP**, then click either **New records since last report** or **Resend All records**; click **Next.** The login screen will appear.
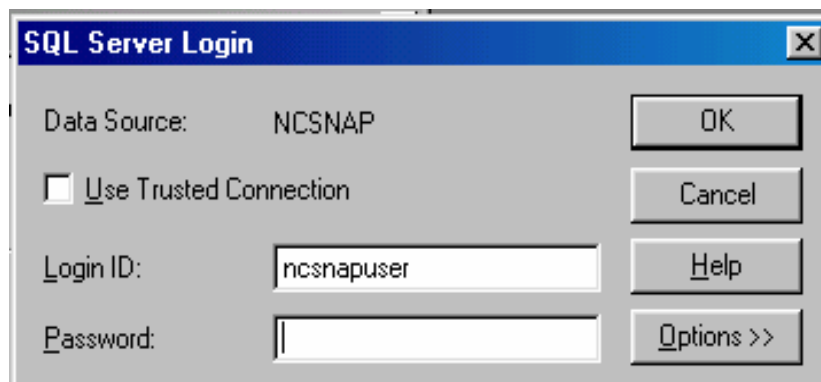

Figure 15 Login Screen

Enter the *NC-SNAP* **Login ID** and **Password** and then click **OK** (if you forget the Login ID or password, contact the *NC-SNAP* director listed in the back cover of this guide). The software will report how many records were sent and provide an option to view a report of the records transmitted.

> **Note:** Occasionally, the *NC-SNAP* login screen defaults to the user's local login ID. The user's local login ID cannot be used to send data to the statewide server.

9.0   Technical Support

This guide should provide data managers with the information required to utilize the *NC-SNAP* software and databases. However, unforeseen problems may still arise. If you find yourself at an impasse, you can contact the following *NC-SNAP* support personnel:

> **Note:**   All software technical problems, including data transmission problems, should first be worked with your local computer support department (IT or MIS department) before contacting **Software Technical Support**.

NC-SNAP **Software Technical Support**: for help with software technical problems, IT or MIS professional should contact Bill Satterfield at (919) 733-7260 or Bill.Satterfield@ncmail.net.

NC-SNAP **DD Section Policy and Procedures:** questions regarding policies and procedures should be addresses to Rod Realon at (919) 733-3654 or Rodney.Realon@ncmail.net.

NC-SNAP **Software and Reports Help or Advise,** or questions regarding this guide, should be directed to the *NC-SNAP* director at (919) 575-1000 or Regina.Blalock@ncmail.net.

The *NCSNAP* **Login ID and the** *NCSNAP* **Password** will be provided only to those individuals assigned to maintain the *NC-SNAP* databases in their respective area programs/LMEs. If you forget the Login ID or password, call any of the support numbers listed above.

Microsoft application software licensing information is provided in the *NC-SNAP Software Installation Guide*.

<u>Notes</u>